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AUTHOR Benner, Sandy
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ABSTRACT

The in-basket simulation package was designed to help students learn about working in a department store. Various activities commonly occurring in retailing are simulated through the use of written memos and telephone messages. The learning activities were written for use in either a traditional classroom or a model store. The goal of the package is to acquaint the student with situations surrounding various tasks that must be performed in a store. The scope of topics presented was reduced to functions rather than positions in an effort to better enable the students to identify with the actual units of work to be performed. (Author/VA)

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DEPARTMENT STORE PROBLEMS

AN IN-BASKET SIMULATION

Prepared by

Sandy Benner
Red Wing Area Vocational Technical Center
Red Wing, Minnesota

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INTRODUCTION

This In-Basket simulation package was designed to help students learn about working in a department store. Various activities commonly occurring in retailing are simulated through the use of written memos and telephone messages. These learning activities were written for use in either a traditional classroom or a model store.

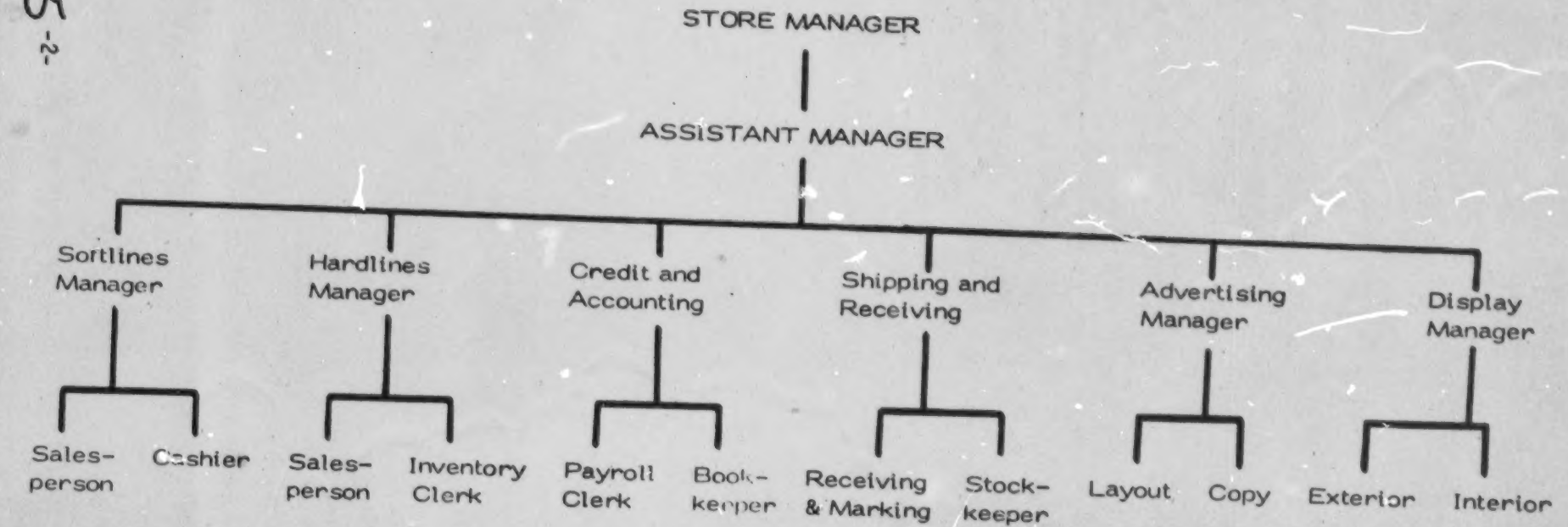
Each of the "positions" within this learning package (see Page 2) represent more closely an area of responsibility than they do an actual position in a real store. These functions are treated as jobs for the purpose of facilitating learning about retailing tasks. It should be explained that these "positions" simply represent functions that may be performed by more than one person in a store. Also, several of these tasks may actually be the responsibility of just one person.

The goal of the package is to acquaint the student with situations surrounding various tasks that must be performed in a store. The matter of whose responsibility each one actually is would be determined by every individual store's organization. By reducing the scope of topics to functions rather than positions, students will be better able to identify with the actual units of work to be performed. They will also be able to apply their new knowledge to a variety of actual store organizations.

Objectives for Student Use.

1. To expose students to situations occurring in department store work.

This is the organizational chart of the various functions found in a department store. An actual store would have several different hard and softlines departments, for example, and there would be many different salespeople. This chart shows the units of work provided in this package.



2. To demonstrate how different departments may be affected by the same matter.
3. To help students start establishing priorities as a basis for decision making.
4. To get students to use their creativity and background knowledge in making decisions.
5. To acquaint participants with the time element affecting business actions.
6. To provide a median for discussing job responsibilities.

DIRECTIONS TO THE INSTRUCTOR

Preparing students for this learning activity should begin with an explanation of the in-basket technique of simulating actual experiences. In the case of our department store, the situations that arise are described through the use of memos. These messages are waiting for the "employee" upon return from lunch or breaks, or are there upon arrival at the beginning of the day. These messages and/or memos are the means of communicating problems and requests for action.

The "organizational chart" (see Page 2) for the store in this activity should be explained to the class next. (Use of an overhead transparency here may be helpful.) The idea should be explained that this chart (and each simulation activity) represents major areas of responsibility within a store. There are not specifically individual jobs or positions as would be described for a real store.

A review of the problem solving techniques and decision making methods will help orient the student to the idea of selecting choices. Factors involved in business memos and human relations should also be reviewed. It will help to point out how duties vary with the amount of responsibility involved in the particular position.

These materials may be used in either a traditional classroom setting or in a model store. One unit of work is provided to each "position" on the organizational chart. Allowing for group or class discussion of individual responses, each unit should take approximately one classroom hour to complete. There are several alternative methods of approaching these materials.

One unit of materials may be selected to accompany classroom instruction.

The regular teaching plan would be followed and the units would be used as they apply. All of the students would work on the memos for this "position" simultaneously. Group discussions of selected responses would expose the students to additional ideas about possible solutions.

If the model store format is used, each student would be assigned a unit of work appropriate to his/her position within the store. Solutions would be written and either discussed with the instructor or supervisor or handed in for correction. Students would receive other units of work when they change positions within the store.

Either of the two previous methods may be altered by grouping students into teams or pairs for their original decisions.

As one master set of the problems is provided, individual units should be duplicated in accordance with the manner you intend to use them. Memos may be cut apart if desired; however, stapling them together in booklet form may make them easier to handle. The situation description (i.e., "You are the Display Manager") should be on top of the group of memos. Numbers found in the upper right hand corner are for ease of identification when answering. They do not indicate importance or urgency in the messages.

It is suggested that the DIRECTIONS TO THE STUDENTS (Pages 7-9) be duplicated and handed out or presented by overhead transparency to the entire class. The sample memos and possible solutions will also be beneficial to student understanding of what to do. Students should be made aware that there are many possible solutions to the problems posed in the units of work. They will only be asked to make decisions of when and how to deal with the problems, and not actually

to decide what the solution would be. Class discussion will bring up the matter deciding what actually should be done to solve the problem.

These materials can be modified for repeated future use. Small changes by the instructor could cast a new light on the given problems. Possible change could be made relative to:

1. Season and particular period of the season.
2. Day of week.
3. Time of day.
4. How busy the store is.

Also, a special theme or promotion for all personnel t be involved with could v the emphasis and responses to the units of work.

Keeping a file on student experiences at training stations will also pr vide additional resources for new problems.

DIRECTIONS TO THE STUDENTS

You are to assume that you fill one of the positions within this store. For one hour, you will make the decisions which you believe to be the best solutions for the problems facing you. You will be asked to justify your solutions with the reasons why you made the decision(s) you did. It is important that you read through all of the memos before starting to make your decisions. Then decide whether you are going to:

1. Take immediate action (and if so, what will it be?),
2. Postpone action (for how long?), or
3. Delegate this to someone else (who would it be?).

You will then record your answers and their reasons on an answer sheet.

EXAMPLE: You are the Advertising Manager. It is Tuesday morning and you have just arrived at work. The following memos are waiting on your desk:

A. TO: Advertising Manager
FROM: Softlines Department Manager
RE: The big sale on dresses this Thursday
MESSAGE: The shipment of promotional dresses that we've been advertising has just come in--it's the wrong shipment! What do we do now?

B. TO: Advertising Manager
FROM: Store Manager
RE: This week's newspaper ads
MESSAGE: Our ads for the big sale this week have been virtually buried. What ideas do you have for us to get better mileage out of our advertising dollars? I would like to see the layouts before

they go to print today.

C. TO: Advertising Manager

FROM: Miss Rose Smith, KNOB Radio

RE: The promotion for the big sale

MESSAGE: She would like to stop by this morning to discuss any last-minut plans for the sale. She will call at 9:45 for an appointment. Do you want to see her?

Here is how one student solved these problems:

WHAT I DID	REASON
A. Immediate action; call staff and get them to work on new ads immediately. Look into getting more air time or changing spots.	There are laws against advertising things that you don't have in stock, so something must be done fast Today's ads have already been set in type, but there is a possibility that I can still have a radio spot cut.
B. Postpone action; make an appointment to see the manager later in morning, or early afternoon. After other problems have been dealt with, look at recent papers to determine the problem and solutions.	Making an appointment will let the manager know that I am working on the problem and will have some answer for him. The other matters are more urgent right now, and it is better to get them started before I take care of this.

Continued on next page

WHAT I DID	REASON
C. Immediate action; call my secretary and inform her that I would like to see Miss Smith as soon as possible this morning. Get the information on the dress shipment from softlines.	A few more radio spots could help me out of the problem in "A" above. The sooner I see her, the quicker the station can make my changes. Get the information so that I will be ready when she comes.

IN-BASKET SIMULATION ACTIVITY

ANSWER SHEET

Name: _____

Position: _____

Date: _____

WHAT I DID	REASON
MEMO # __	

YOU ARE THE STORE MANAGER

You are the manager of our department store, and a well respected person within the community. Today is Wednesday. You took the morning off because you have to work until 9:00 tonight. The store is busy when you come in at noon. There is a pile of papers on your desk, and it looks as if there's no time like the present to get to work on them . . . .

1

TO: Store Manager

DATE: Wednesday TIME: Morning

WHILE YOU WERE OUT

M Credit & Accounting Manager

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you X
Urgent	Will call again

Message: He would like to speak with you this afternoon regarding a raise in pay.

2

TO: Store Manager

DATE: Wednesday TIME: Morning

WHILE YOU WERE OUT

M Chamber of Commerce

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: Remember the luncheon meeting tomorrow at Wade's. They are having a speaker on shoplifting.

3

TO: Store Manager

DATE: Wednesday TIME: Forenoon

WHILE YOU WERE OUT

M Advertising Manager

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent X	Will call again

Message: The hardlines department has just informed him that the lawn mowers for the special are defective. The ad has already gone to print. Please advise.

4

TO: Store Manager

DATE: Wednesday TIME: Morning

WHILE YOU WERE OUT

M Mavis Windsor

of Shopper's Service Phone 729-3333

Telephoned X	Came to see you
Please call X	Wants to see you X
Urgent	Will call again

Message: Her report is completed and she will be available for purposes of discussing it this afternoon between 1:30 and 3:00.

5

MEMO

To: Store Manager

From: Softlines Manager

Re: Lingerie Supplier

Message: We have been having repeated problems with our lingerie supplier--late shipments, incomplete shipments, substitutes, etc. I feel our business in this department has been seriously harmed because of their goof-ups, to say nothing of the advertising dollars lost because of them.

I had asked earlier this year to be authorized to purchase from a different supplier, and was at that time refused. I feel the time is right to reconsider. Could we discuss this problem again?

6

MEMO

To: Store Manager

From: Credit & Accounting Manager

Re: The Profit and Loss statement you requested.

Message: The bookkeeper finished the statement yesterday and remembers handing it to your secretary because you were talking with someone in your office.

7

MEMO

To: Store Manager

From: Display Manager

Re: Purchase of Christmas trim

Message: Would like to purchase our Christmas trim at this time as it is now offered at greatly reduced prices. However, it would put us over budget for this period. Please advise.

8

MEMO

To: Store Manager

From: Your secretary

Re: Visit from the Fire Marshall

Message: The Fire Marshall was here while your were out, and said that there were a few things that don't measure up to standards. He would like you to call him when you get back.

9

MEMO

To: Store Manager

From: Softlines Department

Re: Apprehended Shoplifter

Message: A shoplifter was apprehended in the softlines department while you were out. The policeman that came asked that you call the police headquarters when you came back.

10

MEMO

To: Store Manager

From: Newstore Development, Inc.

Re: Proposed shopping center

Message: A representative of this development company came by to discuss opening a satellite store in the new shopping center they are planning. He said that he would stop back around 2:00 p.m. to discuss this opportunity with you.

YOU ARE THE ASSISTANT MANAGER

You are the assistant manager, and have been in that position for five years. It's an interesting job, and one that's made you thankful many times that you continued your education after your high school graduation. If it hadn't been for that extra training, it would have taken you much longer to reach your present position. Friday is the day you work evenings; it is noon and you've just arrived at the office. Let's see what's waiting in the in-basket . . . .

1

TO: Assistant Manager

DATE: Friday TIME: Morning

WHILE YOU WERE OUT

M Display Manager

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: The work load for my display people has been too heavy. Could we get together and discuss the possibility of hiring an additional part-time helper?

2

TO: Assistant Manager

DATE: Friday TIME: Forenoon

WHILE YOU WERE OUT

M Men's Wear Salesperson

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you
Urgent	Will call again

Message: She is not happy in the Men's department, and wants to talk with you about switching her departmental assignment.

3

TO: Assistant Manager

DATE: Friday TIME: Morning

WHILE YOU WERE OUT

M r. Brankus

of International Life Phone _____

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: He wanted to see you this afternoon, so I put him on the schedule for 2:30.

4

TO: Assistant Manager

DATE: Friday TIME: Morning

WHILE YOU WERE OUT

Mr. Scain, Assistant Manager, next door

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent X	Will call again

Message: There have been several counterfeit bills floated in the area. Suggested that the employees be alerted to special attention upon receipt of $50 bills.

5

MEMO

To: Assistant Manager

From: Store Manager

Re: Turnover of employees

Message: See me at 2:15 to discuss. High recent turnover of employees has been costing us far too much in training expenses.

6

MEMO

To: Assistant Manager

From: Receiving and Shipping Manager

Re: Recent accidents

Message: I believe that I have an idea that would help cut down on the number of accidents in the warehouse. It will involve the purchase of additional equipment. Could we discuss this plan this afternoon?

7

MEMO

To: Assistant Manager

From: Credit and Accounting Manager

Re: Suspected Theft

Message: The bookkeeper has noticed frequent voids on the cash register tapes coinciding with shortages in the till in Sporting Goods. It seems to indicate one person in particular.

8

MEMO

To: Assistant Manager

From: Store Manager

Re: Employee pay raises

Message: Please go through your files in regard to making recommendations for pay raises. I would like to see them in my office by noon.

9

MEMO

To: Assistnat Manager

From: Lulu Belle

Re: Leave of Absence

Message: I would like to have a leave of absence starting Monday and continuing until school starts the first of September. My baby-sitter's father just got transferred and they are moving right away.

10

MEMO

To: Assistant Manager

From: Hardlines Salesperson

Re: Authority of Department Managers over employees in other departments

Message: I would like to talk with you sometime soon about how to deal with other department managers when they ask us to do things in their departments instead of the work we have been assigned to do in our own department. This is becoming more of a problem. I would appreciate any help or advise you can offer. Thank you.

YOU ARE THE SOFTLINES MANAGER

You have just recently become the manager of a softlines department. You are not the only one to recognize that the former manager had allowed a few bad habits to develop, but habits are slow in changing. The time is 9:30 Tuesday morning, and there are some notes waiting for you on your desk. You had better get to work!

1

TO: Softlines Manager

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M s. Rose Smith

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: She is ill and unable to make it in today. No one else was scheduled to work with her today, and the department will be empty unless you can contact someone else.

2

TO: Softlines Manager

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M rs. Harry Lewis

of _____ Phone 272-5400

Telephoned X	Came to see you
Please call X	Wants to see you
Urgent	Will call again

Message: She had bought a present for her sister-in-law last week and had asked for it to be sent directly to her sister-in-law's apartment. She never received the gift and Mrs. Lewis is quite upset.

3

TO: Softlines Manager

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M Store Manager

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you
Urgent X	Will call again

Message: There will be a managers' meeting half an hour after the store opens this morning.

4

TO: Softlines Manager

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M Copywriting

of _____ Phone _____

Telephoned X	Came to see you
Please call X	Wants to see you
Urgent	Will call again

Message: Information you sent for the ad to be run next week is incomplete; he needs the whole works by 9:45 today or he won't be able to get your ad done on time.

5

TO: Softlines Manager

DATE: Monday TIME: Night

WHILE YOU WERE OUT

M Assistant Manager

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you
Urgent	Will call again

Message: He overheard one of your sales girls tell her friend that she would purchase an outfit for her so that she could have the benefit of her employee's discount.

6

TO: Softlines Manager

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M Credit & Accounting

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: We have discovered a mistake in Sally's tax forms. Could you send her in when she's got a few minutes?

7

TO: Softlines Manager

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M Store Manager

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you
Urgent X	Will call again

Message: We need your orders this morning or they won't be sent this week.

8

TO: Softlines Manager

DATE: Monday TIME: Evening

WHILE YOU WERE OUT

M Receiving and Marking

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you
Urgent	Will call again

Message: This is only partial shipment of your bathrobe order. Will send up the remainder when it comes in.

9

M E M O

To: Softlines Manager

From: Sally Jones

Re: Mary's work

Message: I know that Mary is a very good salesperson and a great asset to the department, but she has some very poor habits regarding her picking up after herself. She leaves merchandise scattered all over the department, and the rest of us have to pick up after her. If you could talk to her about putting merchandise away systematically after she shows it, I'm sure it would really help out. Her messiness has caused some hard feelings and we sure don't want it to go any further. Thanks a lot.

10

M E M O

To: Softlines Manager

From: Store Manager

Re: Recent rash of short-change artists in area

Message: The managers in the area have put out an alert regarding recent problems with short-change artists. So far they have not been able to get a description of the culprit(s). Alert your people to the problem and inform them to make observations of any suspicious persons causing trouble at the till.

YOU ARE THE HARDLINES MANAGER

You are a department manager in one of our hardlines departments. After your lunch hour, you lead a training session for new store employees from 1:00 until 2:00. While you were out these messages came in . . . .

1

TO: Hardlines Manager

DATE: 7/17 TIME: 1:15

WHILE YOU WERE OUT

M Advertising

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you
Urgent X	Will call again

Message: They need the data on the ads you want run the 1st through the 15th of next month. The information is needed by 4:30 this afternoon or you'll have to forfeit the spots for your department.

2

TO: Hardlines Manager

DATE: 7/17 TIME: 1:22

WHILE YOU WERE OUT

M Assistant Store Manager

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: The D.E. Coordinator from the high school has some students interested in hardlines. Do you have the need for a part-time trainee?

3

TO: Hardlines Manager

DATE: 7/17 TIME: 1:50

WHILE YOU WERE OUT

M rs. Xavier

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: She called to remind you of the Jaycee's luncheon meeting the 19th.

4

TO: Hardlines Manager

DATE: 7/17 TIME: 1:37

WHILE YOU WERE OUT

M r. Visto

of Jungle Jym Corp. Phone (324) 786-3210

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: The factory is sold out of the particular item you ordered, but he has a close substitute if you are interested. He said they can offer a price cut on the order if the number of units ordered was increased.

5

TO: Hardlines Manager

DATE: 7/17 TIME: 1:05

WHILE YOU WERE OUT

M Warehouse

of _____ Phone _____

Telephoned	X	Came to see you	
Please call	X	Wants to see you	
Urgent		Will call again	

Message: They just located the merchandise you wanted that had been missing; what should they do with it?

6

TO: Hardlines Manager

DATE: 7/17 TIME: 1:28

WHILE YOU WERE OUT

M Store Manager

of _____ Phone _____

Telephoned		Came to see you	X
Please call		Wants to see you	X
Urgent		Will call again	

Message: He would like to see you in regards to last month's lower gross profit in the hardlines department, and what preventive measures are being taken for this month.

7

TO: Hardlines Manager

DATE: 7/17 TIME: 1:45

WHILE YOU WERE OUT

M Receiving

of _____ Phone _____

Telephoned	X	Came to see you	
Please call	X	Wants to see you	
Urgent		Will call again	

Message: The special order you placed two weeks ago was omitted and other merchandise sent in its place.

8

TO: Hardlines Manager

DATE: 7/17 TIME: 1:13

WHILE YOU WERE OUT

M Credit & Accounting

of _____ Phone _____

Telephoned	X	Came to see you	
Please call	X	Wants to see you	
Urgent	X	Will call again	

Message: One of your cash registers was $106.37 short last night. There was a sale for that amount rung up by "P". Please trace down and report back by 3:00 if possible.

9

MEMO

To: Hardlines Manager

From: Assistant Manager

Re: Employees socializing on company time

Message: I have observed your inventory clerk visiting in person and on the phone with his girlfriend. They have been stretching their coffee breaks much beyond acceptable limits. This not only is breaking store rules, it is creating hostility among other employees.

10

MEMO

To: Hardlines Manager

From: A part-time employee

Re: Other department managers' authority

Message: I don't want to complain or get anyone into trouble, but when you leave the floor, the manager next door in Sporting Goods tells us to do things for him in that department, and our area ends up being unattended. What is the policy on this?

YOU ARE THE CREDIT AND ACCOUNTING MANAGER

You are the credit and accounting manager, and have returned to work Tuesday morning after a week's vacation. Your in-basket is stacked with messages. It looks as if the vacation is definitely over now. Time to start making decisions again, isn't it?

1

TO: Credit & Accounting Manager

DATE: Wednesday TIME: Afternoon

WHILE YOU WERE OUT.

M s. Mildred Haynes

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: She was very disturbed that she had been asked to open a charge account and later informed that she had not been accepted. She said she was going to take her business elsewhere from now on.

2

TO: Credit & Accounting Manager

DATE: Monday TIME: Afternoon

WHILE YOU WERE OUT

M Bookkeeper

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: The figures on last month's Profit and Loss Statement can't be correct, and I haven't been able to find the mistakes. Could you come over and check them?

3

TO: Credit & Accounting Manager

DATE: Thursday TIME: Afternoon

WHILE YOU WERE OUT

M s. Lulu Belle

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you
Urgent	Will call again

Message: She wants to know if she can have her employee's credit limit extended so that she can get her kids outfitted for school.

4

TO: Credit & Accounting Manager

DATE: Friday TIME: Afternoon

WHILE YOU WERE OUT

M s. Rose Smith

of Sportswear Phone _____

Telephoned X	Came to see you
Please call X	Wants to see you
Urgent	Will call again

Message: She got a very rude woman on the telephone complaining about the rate of interest. Rose told her that she would get the information and have her call returned. Would you get in touch with Rose?

5

MEMO

To: Credit and Accounting Manager

From: Assistant Manager

Re: Credit promotion

Message: Our newly opened charge accounts are not up to the number anticipated for this month. Develop an in-store credit promotion to help make the employees more aware of the important role they play in acquiring new charge accounts. I would like to hear your plans by the day after tomorrow, so that we can present them at the meeting this Saturday.

6

MEMO

To: Credit and Accounting Manager

From: Store Manager

Re: Accounts Receivable

Message: I would like to see you at 10:30 this morning regarding the status of our Accounts Receivable.

7

MEMO

To: Credit and Accounting Manager

From: Sportswear

Re: Charge accounts for teens

Message: We have had an increasing amount of teenagers indicate that they would like to open charge accounts with us, but our present standards do not allow this because of age. Could we get together and discuss the possibility of working out something special to keep the teen market coming in?

8

MEMO

To: Credit and Accounting Manager

From: Delivery

Re: Lost charge slip

Message: I have lost the store's copy of the charge slip for the washer I delivered to Selma Twig, 3342 23rd Ave. So. The model was #LSO 771.

9

MEMO

To: Credit and Accounting Manager

From: Bookkeeper

Re: Repeated misadding on charge slips

Message: Barry Mitchell has repeatedly misadded the amount of sales on charge slips. I have pointed his errors out to him on several occasions, but to no avail. This has gotten embarrassing for us when we have had to call customers and explain the situation, especially when it's happened more than once.

I feel that this situation has gone beyond my control and would appreciate some assistance from you on this problem. Thank you.

10

MEMO

To: Credit and Accounting Manager

From: Payroll

Re: Payroll record forms

Message: Our supply of payroll record forms is low and we need to order more soon.

YOU ARE THE PAYROLL CLERK

You are the payroll clerk in our store. This is Wednesday afternoon and so far the day has been uneventful. You just had lunch with a friend, and are wondering if you will be able to find enough work to keep you busy until two o'clock when the reports come in. The secretary just brought in a stack of memos for you. Better take a look and see what you can do with them . . . .

1

TO: Payroll Clerk

DATE: Wednesday TIME: Noon

WHILE YOU WERE OUT

M r. Mark Johnson

of Sporting Goods Phone

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: He has just become a father and would like you to add an exemption to his tax forms.

2

TO: Payroll Clerk

DATE: Wednesday TIME: Noon

WHILE YOU WERE OUT

M Assistant Manager

of Phone

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: He has just hired Miss Stach Hall for the lingerie department, and is sending her to you to get all the necessary payroll forms.

3

TO: Payroll Clerk

DATE: Wednesday TIME: Noon

WHILE YOU WERE OUT

M s. Susan MacIntosh

of Phone

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: Her insurance deduction was not taken out of her check. She wants to know if it was just overlooked, or if she has been cancelled, or if the policy is paid up.

4

TO: Payroll Clerk

DATE: Wednesday TIME: Noon

WHILE YOU WERE OUT

M Credit & Accounting Manager

of Phone

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: Rose Smith's accumulated earnings are over the cut-off amount of FICA tax; you have been making too many deductions from her checks.

5

MEMO

To: Payroll Clerk

From: Assistant Manager

Re: Tardy Employees

Message: Send me a list of employees who have been habitually tardy. If possible, I would like this list by 3:00 this afternoon.

6

MEMO

To: Payroll Clerk

From: Store Manager

Re: A Commission Pay Plan

Message: We are considering the addition of a commission pay plan in conjunction with our hourly wage scale. If we were to put such a plan into effect, would you be able to handle it yourself or would we need to hire some part-time help for you?

7

MEMO

To: Payroll Clerk

From: Harvey Swensen

Re: A discrepancy in his check

Message: The amount in writing does not correspond to the amount in figures on my last check. Could you reconcile this today -- I need the money right away.

Thanks!

3

MEMO

To: Payroll Clerk

From: Tracy Tyler

Re: Name change

Message: I will be getting married this weekend to Sam Thompson. Do I need to fill out any forms before we leave on our honeymoon? Tomorrow is my last day before my vacation starts.

YOU ARE THE BOOKKEEPER

You are the bookkeeper in our store. You enjoy your work, but today your posting machine is broken. Your schedule is getting thrown off, and work is piling up. Returning from your morning coffee break, you find more work for you stacked in your in-basket. Better see what you can do to take care of those memos while the repairman finishes fixing the posting machine.

1

TO: Bookkeeper

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M Softlines Manager

of _____ Phone _____

Telephoned	X	Came to see you	
Please call		Wants to see you	
Urgent		Will call again	

Message: Mrs. Jane Brewbacher has received an adjustment on a defective purchase made in the Sportswear department on the 15th. Please see that $5.00 is deducted from her balance. Thanks!

2

TO: Bookkeeper

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M r. Marvin Link, windows

of The Franklin Co. Phone 729-5588

Telephoned	X	Came to see you	
Please call	X	Wants to see you	
Urgent		Will call again	

Message: Payment on your statement of June 30th was in excess of actual charges. Please advise on procedure preferred: credit, refund, or return of original checks.

3

TO: Bookkeeper

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M Payroll

of _____ Phone _____

Telephoned		Came to see you	X
Please call		Wants to see you	
Urgent		Will call again	

Message: Rose Smith is coming in during my lunch hour to fill out these tax forms. Could you take care of this for me? Thanks.

4

TO: Bookkeeper

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M Store Manager

of _____ Phone _____

Telephoned	X	Came to see you	
Please call		Wants to see you	
Urgent		Will call again	

Message: I would like to see last month's operating statement in my office by 3:30 this afternoon.

5

MEMO

To: Bookkeeper

From: Inventory Clerk

Re: Actual Physical Inventory

Message: Our actual physical inventory for the hardware department is $254,279.00 as of last night at closing. Please adjust book inventory accordingly.

6

MEMO

To: Bookkeeper

From: Softlines Manager

Re: Open-to-buy

Message: Please send me a departmental breakdown on the open-to-buy for each of the softlines departments.

7

M E M O

To: Bookkeeper

From: Walman Calculator repairman

Re: Repair of your posting machine

Message: I have discovered what is wrong with your posting machine, and have gone to get a part from the office downtown. It should be completely finished by noon today.

8

M E M O

To: Bookkeeper

From: Hardlines Manager

Re: Comparison of credit sales with last year's figures

Message: Please send me the run-down on how our departments compare with last year's figures on the numbers of and total amount of charge sales.

YOU WORK IN RECEIVING AND MARKING

You are the D. E. Trainee working part time in the Receiving and Marking section. It is Tuesday afternoon, and you have just come in to start working at 1:30. The following messages are waiting for you. It is your responsibility to read them and decide what action should be taken.

1

TO: Receiving & Marking

DATE: 7/18 TIME: 10:13

WHILE YOU WERE OUT

M Receiving & Shipping Manager

of _____ Phone _____

Telephoned	X	*Came to see you*	
Please call		*Wants to see you*	
Urgent	X	*Will call again*	

Message: Check the ticketing machines to make sure the coding device is set correctly.

2

TO: Receiving & Marking

DATE: 7/18 TIME: 10:55

WHILE YOU WERE OUT

M Stockkeeping

of _____ Phone _____

Telephoned	X	*Came to see you*	
Please call		*Wants to see you*	
Urgent		*Will call again*	

Message: We can't find any of the hang tags you wanted. How long has is been since they were ordered? There are plenty of other kinds of tickets in stock -- if you need them let me know.

3

TO: Receiving & Marking

DATE: 7/18 TIME: 10:20

WHILE YOU WERE OUT

M Ladies' Lingerie

of _____ Phone _____

Telephoned	X	*Came to see you*	
Please call		*Wants to see you*	
Urgent	X	*Will call again*	

Message: Please send the partial shipment of bathrobes #4896 to the floor as soon as you can finish them.

4

TO: Receiving & Marking

DATE: 7/18 TIME: 12:00

WHILE YOU WERE OUT

M Children's Wear

of _____ Phone _____

Telephoned	X	*Came to see you*	
Please call		*Wants to see you*	
Urgent		*Will call again*	

Message: That last group of play sets you sent out was missing the size 3. Was it sent or did it get lost along the way?

5

MEMO

To: Receiving and Marking

From: Store Manager

Re: Return of order #77756 to vendor

Message: Casual Shoe Company has sent return labels for aforementioned order. Please process as quickly as possible.

6

MEMO

To: Receiving and Marking

From: Assistant Manager

Re: Scheduling for Fall

Message: I would like to see you today in my office in regards to the number of hours you will be able to work this Fall.

7

MEMO

To: Receiving and Marking

From: Sportswear

Re: Stock #57574

Message: Above stock number has been mismarked -- the color is supposed to be wineberry, not plum. Can they be remarked today?

8

MEMO

To: Receiving and Marking

From: Receiving and Shipping Manager

Re: Ajax Trucking

Message: Could we get together to discuss this problem; it seems both sides in this matter have legitimate complaints. Maybe we can get them ironed out before this conflict goes any further.

YOU ARE THE STOCKKEEPER

You are the stockkeeper in the warehouse of our department store. It is Wednesday and you have just come back from your lunch hour. The following messages have accumulated while you were out. How will you dispose of these problems?

1

TO: Stockkeeping

DATE: 7/19 TIME: 2:08

WHILE YOU WERE OUT

M Receiving & Shipping Manager

of Phone

Telephoned	Came to see you X
Please call	Wants to see you
Urgent	Will call again

Message: I realize you were short of help last night, but we have had a complaint on the mess in the stock room. See what you can do to take care of the cartons and boxes sitting around.

2

TO: Stockkeeping

DATE: 7/19 TIME: 2:19

WHILE YOU WERE OUT

M rs. Bainsburrough - Jim's mother

of Phone

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: The new stock boy will not be coming in to work again tonight he is still sick.

3

TO: Stockkeeping

DATE: 7/19 TIME: 2:15

WHILE YOU WERE OUT

Receiving & Marking

of Phone

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: Check the last couple shipments of goods you've shelved to make sure the seasonal codes are correct.

4

TO: Stockkeeping

DATE: 7/19 TIME: 2:26

WHILE YOU WERE OUT

M Men's Wear

of Phone

Telephoned X	Came to see you
Please call	Wants to see you
Urgent X	Will call again

Message: Send out 1 each of stock number 44582 in sizes 32, 36, 38, and 42.

5

MEMO

To: Stockkeeping

From: Children's Wear

Re: Charlie Brown Nightwear

Message: Please send out a whole carton of C. B. sleepwear #32785, assorted colors.

6

MEMO

To: Stockkeeping

From: Store Manager

Re: Seasonal goods from period B-2

Message: Check through the stock to find all seasonal goods from last summer. Make sure that they got sent out in time for markdowns to be taken on them for this weekend's sale.

7

MEMO

To: Stockkeeping

From: Receiving and Marking

Re: Order #4896

Message: Ladies' Lingerie needs this order of bathrobes on the floor immediately. It is not a complete order, but please tell them that I will process the rest of them as soon as they come in.

8

MEMO

To: Stockkeeping

From: Payroll

Re: United Fund Drive

Message: Attached is the brochure explaining the United Fund Drive. Our store has set a goal of 100% participation this year and hope that you can help us by contributing. The average suggested contribution for part-time employees is one-half hour's wages per month for the year. The contribution will be deducted directly from the second week's check every month.

Please fill out and return to Payroll the attached cards as soon as possible. Thank you for contributing to our 100% participation.

YOU ARE THE RECEIVING AND SHIPPING MANAGER

You are the receiving and shipping manager and have been in that department for four years having worked your way up from stockkeeping. It is Saturday morning, around 10:00. These memos have accumulated from Friday night and earlier this morning. You had hoped to get away this afternoon. How will you handle these situations?

1

: Receiving & Shipping Manager

TE: 7/16 TIME: 9:20 p.m.

WHILE YOU WERE OUT

Dave

Stockkeeping Phone

elephoned	Came to see you X
lease call	Wants to see you
rgent	Will call again

ssage: That new stock boy called in sick again tonight and they've been swamped. Could you talk to him about being so irregular? It seems he's never there when he's needed the most.

2

TO: Receiving & Shipping Manager

DATE: 7/17 TIME: 12:45

WHILE YOU WERE OUT

M Store Manager

of Phone

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: He has received a letter from Ajax Trucking regarding our receiving personnel. It seems they have been unduly slow in checking in parcels, which results in throwing off the drivers schedules. Find out what the problem is and report back.

3

: Receiving & Shipping Manager

TE: 7/17 TIME: 12:10

WHILE YOU WERE OUT

Assistant Manager

Phone

elephoned X	Came to see you
lease call	Wants to see you X
rgent	Will call again

ssage: The second quarter has really been a bad one for accidents in the stock room. Could you and he get together this afternoon and discuss the situation?

4

TO: Receiving & Shipping Manager

DATE: 7/17 TIME: 12:50

WHILE YOU WERE OUT

M Manager, Credit & Accounting

of Phone

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: They are considering some new forms to better facilitate accounting procedures, and would like your opinion on how they would work out in your department. Can you and he get together soon on this?

5

TO: Receiving & Shipping Manager

DATE: 7/17 TIME: 12:35

WHILE YOU WERE OUT

M George, Receiving and Marking

of _____ Phone _____

Telephoned	X	Came to see you	
Please call	X	Wants to see you	
Urgent		Will call again	

Message: The new girl has not been following the established procedure for checking quality. Is there a new policy or should he talk to her about it?

6

TO: Receiving & Shipping Manager

DATE: 7/16 TIME: 7:45 p.m.

WHILE YOU WERE OUT

M Dorothy, Receiving and Marking

of _____ Phone _____

Telephoned	X	Came to see you	
Please call	X	Wants to see you	
Urgent		Will call again	

Message: Order #4896 (Bathrobes) came in tonight, but the shipment is incomplete. Should they run them through or hold until entire shipment is received?

7

TO: Receiving & Shipping Manager

DATE: 7/17 TIME: 12:18

WHILE YOU WERE OUT

M Ladies' Lingerie

of _____ Phone _____

Telephoned	X	Came to see you	
Please call		Wants to see you	
Urgent		Will call again	

Message: When order #4896 (Bathrobes) comes in, could you process them through as quickly as possible. They need them right away.

8

TO: Receiving & Shipping Manager

DATE: 7/17 TIME: 12:02

WHILE YOU WERE OUT

M Store Manager

of _____ Phone _____

Telephoned		Came to see you	X
Please call		Wants to see you	X
Urgent		Will call again	

Message: His records show, as of the last inventory, that there has been some shrinkage in the stockroom. How do you account for this and what suggestions for improvement can you make?

9

MEMO

To: Receiving and Shipping Manager

From: Receiving and Marking

Re: Ajax Trucking, Inc. drivers

Message: We have been having repeated problems with Ajax drivers being in a hurry to drop their deliveries and leave. They continually interrupt us when we try to get accurate counts of parcels, so that we will sign the delivery receipt and let them go. Please advise.

10

MEMO

To: Receiving and Shipping Manager

From: Store Manager

Re: Stockroom

Message: The stockroom was left in terrible shape last night. Be sure and have it cleaned up immediately. If the fire marshall came, we'd really be in a pickle.

YOU ARE THE ADVERTISING MANAGER

You are the advertising manager. It is 2:00 and you have just returned from lunch. Let's take a look at your in-basket and see what work is in store for you.

1

O: Advertising Manager

ATE: 7/17 TIME: 1:30

WHILE YOU WERE OUT

Penney

f Layout *Phone*

Telephoned	*Came to see you* X
Please call	*Wants to see you* X
Urgent	*Will call again*

essage: The layout for the softlines sale is done and ready for your approval before she sends them to the paper.

2

TO: Advertising Manager

DATE: 7/17 *TIME:* 1:15

WHILE YOU WERE OUT

M r. Fisher

of the high school *Phone* 245-0978

Telephoned X	*Came to see you*
Please call	*Wants to see you* X
Urgent	*Will call again* X

Message: He wanted to arrange an appointment with you to discuss Penney's work. Said he would call back around 2:30

3

O: Advertising Manager

ATE: 7/17 *TIME:* 1:07

WHILE YOU WERE OUT

iss Rose Smith

f KNOB radio *Phone* 245-7963

Telephoned X	*Came to see you*
Please call	*Wants to see you*
Urgent	*Will call again* X

essage: She wanted to check that all details of the campaign for the sale are in order, and find out if there was anything new to be taken care of.

4

TO: Advertising Manager

DATE: 7/17 *TIME:* 1:04

WHILE YOU WERE OUT

M Manager, Credit & Accounting

of *Phone*

Telephoned X	*Came to see you*
Please call X	*Wants to see you*
Urgent	*Will call again*

Message: Last night's ads did not include the "Charge-It" clause they had requested.

59

5

TO: Advertising Manager

DATE: 7/17 TIME: 1:50

WHILE YOU WERE OUT

M Steve

of Copywriting Phone

Telephoned	Came to see you X
Please call X	Wants to see you
Urgent	Will call again

Message: He says that some of the supplies are missing from the workroom again. He and Penney have tried to keep their eyes open but haven't been able to catch the culprit.

6

TO: Advertising Manager

DATE: 7/17 TIME: 1:42

WHILE YOU WERE OUT

M Manager

of Display Phone

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: He'd like to get together with you today or tomorrow to start making plans for the Back-to-School promotions coming up.

7

TO: Advertising Manager

DATE: 7/17 TIME: 1:39

WHILE YOU WERE OUT

Miss Henrietta Spalding

of 226 Miller Ave. Phone 323-1179

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: She was complaining about the lawn mower ad last night. She thought it was disgraceful that we resort to using scantily clad girls to sell machinery.

8

TO: Advertising Manager

DATE: 7/17 TIME: 1:33

WHILE YOU WERE OUT

M rs. Hansen

of Shoe supply Phone (218) 465-2213

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: Casual Shoe Company is discontinuing their subsidy of the co-op ad series #73-8096 through 8109. She is sending a letter informing you of the change on the 20th.

9

MEMO

To: Advertising Manager

From: Personnel

Re: Employee knowledge of sale advertising

Message: It was brought to my attention recently that the employees have not been well informed on our newspaper advertising. It has been our policy that each person be responsible for reading the paper on their own. However, some of the new employees live out of town and subscribe to a different paper. Could we meet at 2:30 today in my office to discuss this problem?

10

MEMO

To: Advertising Manager

From: Men's Wear

Re: Promotion of knit sport shirts

Message: The sport shirts we have advertised on KNOB and in the paper just have not been selling. Perhaps different copy or a new layout would do the trick. What do you think?

YOU ARE THE DISPLAY MANAGER

You are our display manager. It is Monday afternoon, and you have just returned from your lunch. Let's take a look at the memos waiting for you to see what's in store for the afternoon.

1

TO: Display Manager

DATE: 7/18 TIME: 1:28

WHILE YOU WERE OUT

M Manager

of Advertising Phone

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: He said he could meet with you on the Back-to-School promotion tomorrow morning at 10:30 if that time is OK with you.

2

TO: Display Manager

DATE: 7/18 TIME: 1:24

WHILE YOU WERE OUT

M Men's Wear

of Phone

Telephoned	Came to see you X
Please call	Wants to see you
Urgent	Will call again

Message: Their new line of knit shirts is not selling well. Could they have a display on them set up to accompany the advertising we're running on them?

3

TO: Display Manager

DATE: 7/18 TIME: 1:12

WHILE YOU WERE OUT

M Assistant Manager

of Phone

Telephoned X	Came to see you
Please call	Wants to see you X
Urgent	Will call again

Message: He would like to meet with you to discuss a problem involving the interior display staff. Is tomorrow at 10:30 OK?

4

TO: Display Manager

DATE: 7/18 TIME: 1:19

WHILE YOU WERE OUT

M Gordon, Exterior Display

of Phone

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: He's all out of masking tape again and the clerk in hardware says he can't check out anything more from that line to him. He can't finish that job until he gets some tape.

63

5

MEMO

To: Display Manager

From: Store Manager

Re: New display equipment request

Message: Please compile a list of what new display fixtures are necessary, and a list of those items you would like to have if the budget allows. I would like them in order of importance. If possible, I would like to see them tomorrow morning.

6

MEMO

To: Display Manager

From: Children's Wear

Re: Broken Mannequin

Message: A customer's little girl tipped over a mannequin in the department--it's in a couple pieces. We picked up what we could, but we are so busy with this promotion that we don't have time to set up another display on our own. Can you help out?

7

MEMO

To: Display Manager

From: Sportswear

Re: Length of displays

Message: We've had two customers already this week that have come in asking if we didn't have any new merchandise because the window display has been up for so long. It really is an attractive display, but it has been here a long time. Could we have it changed soon?

8

MEMO

To: Display Manager

From: Hardlines manager

Re: Fencing display (interior)

Message: Kent finished the Antiquing Kit display this afternoon and it looks great. He was supposed to set up the fence display but spent the rest of his time talking to Susie in electrical appliances. When I asked about it, he mumbled something about the job taking longer than the amount of time he had left.

9

MEMO

To: Display Manager

From: Window Display

Re: Sportswear display

Message: I have been having trouble with Mabeline in the sportswear. She complains about all the work unless we use her favorite colors. I've tried explaining that not everyone likes the same colors and that what she doesn't like may appeal to someone else. She still insists on the displays being in "her" colors. It's getting where we don't even want to work in her department anymore. Could you talk to her about this?

10

MEMO

To: Display Manager

From: Store Manager

Re: Window display pulling power

Message: Would you please do a traffic count on the two store entrances and the effect of the displays on drawing customers into the store. I would like the study done for a week during the dinner hour (5:30-7:00).

YOU ARE A SOFTLINES SALESPERSON

You are one of the salespeople in a softlines department. The following messages are relayed to you within one half hour of returning from your mid-morning break. Better get to them before business starts to pick up; it's getting near the noon rush hour!

1

TO: Softlines Salesperson

DATE: Monday TIME: Morning

WHILE YOU WERE OUT

M Softlines Manager

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you
Urgent	Will call again

Message: A partial shipment of the special order bathrobes has come in. Would you check for the one Sara Volt ordered?

2

TO: Softlines Salesperson

DATE: Monday TIME: Morning

WHILE YOU WERE OUT

Mrs. Christine Wold

of 509 Birch Avenue Phone 729-4573

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: She wanted to order one of the slips she saw advertised in last night's paper: size 12, med., cornflower blue.

Please mail it to her at above address.

3

TO: Softlines Salesperson

DATE: Monday TIME: Morning

WHILE YOU WERE OUT

M Assistant Manager

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: He would like to see you at 2:30 today.

4

TO: Softlines Salesperson

DATE: Monday TIME: Morning

WHILE YOU WERE OUT

Ms. Lulu Belle

of Men's Wear Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: She asked that when the special of bathrobes hits the floor, you save her a size 16 kelly green. She will be in at 1:00 to pick it up.

5

MEMO

To: Softlines Salesperson

From: Softlines Manager

Re: Short-change artists

Message: Be on the alert for short-change artists; there have been reports from other stores about a rash of them. No description has yet been gotten, so keep your eyes open if you see any trouble at the till. I have been called to a meeting, but the book under the counter has a good chapter on short-change artists. If you can work it in, take a look at pages 103-106. They should give you some review pointers.

6

MEMO

To: Softlines Salesperson

From: Softlines Manager

Re: Your tax forms

Message: The Payroll girl has discovered a mistake in your forms. When you can break away for a few minutes, would you check with her about this?

7

MEMO

To: Softlines Salesperson

From: Store Manager

Re: Store's employee discount policy

Message: Starting Monday, employees may only get discounts for merchandise that they purchase for themselves, but the amount of discount has been raised from 15% to 20%.

8

MEMO

To: Softlines Salesperson

From: Credit and Accounting

Re: Bad Checks

Message: Accept no checks or charges from:

E. V. Waren
1109 Second Street
729-0588

YOU ARE THE CASHIER

You are the cashier. It is Thursday morning, and things have been relatively quiet in our department store. You planned to go to lunch at 11:30. Around 10:45 things start happening, and you get the following messages all of a sudden. What do you do?

1

O: Cashier

ATE: Thursday TIME: Morning

WHILE YOU WERE OUT

s. Cindy Walker

F Softlines *Phone*

Telephoned	*Came to see you* X
Please call	*Wants to see you*
Urgent	*Will call again*

Message: Mrs. Baumgartner would like to have this dress charged to her account and sent to her.

2

TO: Cashier

DATE: Thursday *TIME:* Morning

WHILE YOU WERE OUT

M Credit & Accounting

of *Phone*

Telephoned X	*Came to see you*
Please call	*Wants to see you*
Urgent	*Will call again*

Message: Ruth Meyers has opened an account with us and is authorized to charge the normal limit. She doesn't have a charge plate yet but the purchases she is going to make are OK. Follow regular procedure for non-plate charges.

3

O: Cashier

ATE: Thursday *TIME:* Forenoon

WHILE YOU WERE OUT

iss Jean Loewe

F 443 89th Avenue *Phone* 729-3423

Telephoned X	*Came to see you*
Please call	*Wants to see you*
Urgent	*Will call again*

Message: She would like two of the bathrobes on special put on lay away for her: size 8, red and size 12, royal blue. She has a charge account.

4

TO: Cashier

DATE: Thursday *TIME:* Morning

WHILE YOU WERE OUT

M Stockkeeper

of *Phone*

Telephoned X	*Came to see you*
Please call	*Wants to see you*
Urgent	*Will call again*

Message: He can't find any of the cash register tape on hand. Can you borrow from another department?

5

M E M O

To: Cashier

From: Credit and Accounting

Re: Maximum charge limit

Message: Miss Jean Loewe, 443 89th Avenue has exceeded her floor limit on charge purchases. No further charges will be allowed until notification from this office.

6

M E M O

To: Cashier

From: Bookkeeping

Re: Shortage in till #9 last night

Message: We have detected a shortage in your till last night of $35.68. Can you justify?

7

MEMO

To: Cashier

From: Softlines Manager

Re: Short-change artists

Message: Be on the alert for short-change artists; there have been reports from other stores about a rash of them. No description has been gotten yet, so keep your eyes open to anyone giving you trouble at the till. I have been called to a meeting. If you have any questions the book I left under the counter may help, especially pages 103-106. Remember to call the office for help if you get into a disagreement with a customer.

8

MEMO

To: Cashier

From: Store Manager

Re: Store's employee discount policy

Message: Starting Monday, our employee discount policy will be changed. The amount of employee discount will be 20% as opposed to the current 15%, and the only merchandise that may be discounted is that which is purchased for the employee's use.

YOU ARE A HARDLINES SALESPERSON

You are a salesperson in a hardlines department. This is Friday--your day to work from noon until nine. There are some messages for you when you come in.

1

TO: Hardlines Salesperson

DATE: 7/15 TIME: 10:03

WHILE YOU WERE OUT

M Hardlines Manager

of _____ Phone _____

Telephoned	Came to see you X
Please call	Wants to see you
Urgent	Will call again

Message: The display department may have merchandise from the department to use if they fill out a requisition for the things they want.

2

TO: Hardlines Salesperson

DATE: 7/15 TIME: 10:17

WHILE YOU WERE OUT

M r. Joe Harrington

of 1212 4th Street, E Phone 746-3338

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: He called to tell you that he doesn't want the range you wrote up for him yesterday; he found the same thing cheaper at the shopping center.

3

TO: Hardlines Salesperson

DATE: 7/15 TIME: 10:10

WHILE YOU WERE OUT

M rs. Regna Holmquist

of 1711 34th Ave., N. Phone 729-4885

Telephoned X	Came to see you
Please call X	Wants to see you
Urgent	Will call again

Message: She was expecting the delivery of her new freezer late yesterday afternoon, and had taken off of work early to be there when the men came. Today is her day off--she wants it delivered this morning.

4

TO: Hardlines Salesperson

DATE: 7/15 TIME: 10:22

WHILE YOU WERE OUT

M rs. Bracke

of 812 Sunset Lane Phone 729-9922

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: She wants you to have the drill kit (the one on special) wrapped up for her husband's birthday and charged to her account. She will be sending her son George in to pick it up.

5

MEMO

To: Hardlines Salespeople

From: Hardlines Manager

Re: Special promotion of electric drills

Message: The stockkeepers inform me that they miscounted the number of drills they have in the warehouse, and that the model on sale is the one we are short of stock on. Make an effort to trade up to model #2277 when possible, or we are going to run short of the models on sale.

6

MEMO

To: All Salespeople and Cashiers

From: Credit and Accounting

Re: Counterfeit bills

Message: There has been a rash of $20 counterfeit bills floated lately with serial numbers I 46354829a - 46354900c. If you are given a bill in this series, complete the sale courteously but report the person passing the bill immediately to your supervisor or the Assistant Manager.

7

MEMO

To: Hardlines Salesperson

From: Hardlines Manager

Re: Your note inquiring about the authority of department managers

Message: I would suggest that you discuss this problem with the Assistant Manager. He is in charge of personnel and should be able to give you the straight story about whom you should be taking orders from.

8

MEMO

To: Hardlines Salespersons

From: Credit and Accounting

Re: New Account, may charge effective immediately

Message: Ray Andrews has just opened an account and may make credit purchases up to the normal limit by using the standard procedure for those who have lost their charge-it-plates. He has been given a temporary identification.

YOU ARE THE INVENTORY CLERK

You are the inventory clerk in a hardlines department of our store. Because you were ill yesterday, you are behind in your work. Today is Thursday, and you have returned to work even though you are not feeling up to par yet. The following messages are on your desk.

1

O: Inventory Clerk

ATE: Wednesday TIME: Morning

WHILE YOU WERE OUT

Store Manager

f Phone

Telephoned X	*Came to see you*
Please call	*Wants to see you* X
Urgent	*Will call again*

lessage: Your inventory records show that we are way over the budgeted inventory. Please advise as to why this condition exists.

2

TO: Inventory Clerk

DATE: Wednesday *TIME:* Evening

WHILE YOU WERE OUT

M Automotive Shop

of Phone

Telephoned X	*Came to see you*
Please call	*Wants to see you*
Urgent	*Will call again*

Message: We have frequently run out of stock on tailpipes for 1970 Fords. Please see what you can do about remedying this situation.

3

TO: Inventory Clerk

DATE: Wednesday TIME: Evening

WHILE YOU WERE OUT

M Sporting Goods

of Phone

Telephoned X	*Came to see you*
Please call	*Wants to see you*
Urgent	*Will call again*

Message: The bicycle supplier has just informed me that they are changing the minimum order from two to six. This is effective immediately.

4

TO: Inventory Clerk

DATE: Wednesday *TIME:* Afternoon

WHILE YOU WERE OUT

M Ben, Electrical Appliances

of Phone

Telephoned X	*Came to see you*
Please call X	*Wants to see you*
Urgent	*Will call again*

Message: Have received 12 light fixtures #5615, and have no previous record of such. Is this a replacement or substitution and if so, what is it replacing?

5

MEMO

To: Inventory Clerk

From: Hardlines Department Manager

Re: Invoice #7968

Message: Have just received this invoice stating that we have been sent 350 toolboxes. My records show that we only sold 200 of them during all of last year. Check the inventory conditions and your records of sales.

6

MEMO

To: Inventory Clerk

From: Sporting Goods Manager

Re: Baseball Sale

Message: We are planning a sale on baseballs for next month, the 5th - 7th. Check last year's records and our current stock. Order an appropriate amount for the sale.

7

MEMO

To: Inventory Clerk

From: Sporting Goods

Re: Current stock condition

Message: Please advise on current stock condition of our ski equipment for purposes of ordering.

8

MEMO

To: Inventory Clerk

From: Automotive Shop

Re: Sales of shock absorbers

Message: Please report as to the total number of sales of shock absorbers for the last three months.

YOU ARE THE COPYWRITER

You are our copywriter, it is 1:00 Monday afternoon, and ycu have just come back from lunch. It's going to be a busy afternoon; the pile of memos on your desk may change some of the plans that you had made. Better get to work!

1

TO: Copywriting

DATE: 7/18 TIME: 12:30

WHILE YOU WERE OUT

M iss Rose Smith

of KNOB radio Phone 245-7963

Telephoned	X	*Came to see you*	
Please call	X	*Wants to see you*	
Urgent	X	*Will call again*	

Message: She wanted to discuss additional radio spots to compensate for the advertising lost due to the newspaper workers' strike. She said she will need to know as quickly as possible if she is going to be able to help; most of the space is sold.

2

TO: Copywriting

DATE: 7/18 TIME: 12:08

WHILE YOU WERE OUT

Mr. Waring

of Hardlines Phone

Telephoned		*Came to see you*	X
Please call		*Wants to see you*	
Urgent		*Will call again*	

Message: Last night's newspaper ad on redwood fencing panels listed the price at $41.30 instead of $14.30.

Forward to: Copywriting

3

TO: Advertising Manager

DATE: 7/17 TIME: 3:30

WHILE YOU WERE OUT

M Manager, Credit and Accounting

of Phone

Telephoned		*Came to see you*	
Please call	X	*Wants to see you*	
Urgent		*Will call again*	

Message: Last night's ads did not include the "Charge-It" clause they had requested. What happened here?

4

TO: Copywriting

DATE: 7/18 TIME: 12:20

WHILE YOU WERE OUT

Ms. Mary Kay

of Children's Dept. Phone

Telephoned	X	*Came to see you*	
Please call		*Wants to see you*	
Urgent		*Will call again*	

Message: Response to the spots running on KNOB have been great; she says they've been running all morning to keep up with the business they have brought in.

5

MEMO

To: Copyw.iting

From: Advertising Manager

Re: Wrong shipment of special promotional dresses for Wednesday's sale

Message: The advertising of the big sale on dresses is going to need some doctoring; we received the wrong shipment. What can you arrange (perhaps on radio) to compensate?

6

MEMO

To: Copywriting

From: Advertising Manager

Re: Buried ads this week

Message: The store manager has complained about how the newspaper buried our ads this week. Will it be possible to cut the copy to allow for more white space? What suggestions can you make?

7

MEMO

To: Advertising Manager

From: Men's Wear

Re: Promotion of knit sport shirts

Message: The sport shirts we have advertised on KNOB and in the paper just have not been selling. Perhaps different copy or a new layout would do the trick. What do you think?

Forward to Copywriting

Please see what kind of sketches you can come up with before 2:00 . . . meet me in the office to discuss them.

Ad. Mgr.

8

MEMO

To: Copywriting

From: Advertising Manager

Re: Employee knowledge of ads

Message: We are having a problem with our employees not being informed about the ads we are running. Could you furnish each department with the copy for ads pertaining to that particular department? Also, would it be possible to tape record radio and television spots on a cassette that could be kept in the employee lounge for them to listen to?

YOU ARE WORKING IN ADVERTISING LAYOUT

You are working in our advertising department, and are specifically responsible for ad layouts. It is the usual hectic Wednesday, and you have just come back from a hasty lunch to find more work in your basket. Time to get back to work!

1

TO: Advertising Layout

DATE: 7/18 TIME: 12:13

WHILE YOU WERE OUT

M Manager

of _____ Phone _____

Telephoned	X	*Came to see you*	
Please call		*Wants to see you*	
Urgent	X	*Will call again*	

Message: Difficulties with Carefree Coordinates have made it impossible to run the promotion on the Carefree summer wear. Don't send the ad to the paper.
(You sent it in just prior to lunch.)

2

TO: Advertising Layout

DATE: 7/18 TIME: 12:20

WHILE YOU WERE OUT

Mrs. Bradley (Copywriter's mother)

of _____ Phone _____

Telephoned	X	*Came to see you*	
Please call		*Wants to see you*	
Urgent		*Will call again*	

Message: Steve is sick with the flu today and won't be coming to work this afternoon. He asked that you get approval on the ad he left last night.

3

TO: Advertising Layout

DATE: 7/18 TIME: 12:10

WHILE YOU WERE OUT

M Manager

of _____ Phone _____

Telephoned	X	*Came to see you*	
Please call		*Wants to see you*	
Urgent		*Will call again*	

Message: Casual Shoe Company has cancelled reimbursements on co-op ads 8096-8109.

Forward to: Layout

4

TO: Advertising Layout

DATE: 7/17 TIME: 1:39

WHILE YOU WERE OUT

Miss Henrietta Spalding

of 226 Miller Ave. Phone 323-1179

Telephoned	X	*Came to see you*	
Please call		*Wants to see you*	
Urgent		*Will call again*	

Message: She was complaining about the lawn mower ad last night. She thought it was disgraceful that we resort to using scantily clad girls to sell machinery.

5

MEMO

To: Advertising Layout

From: Advertising Manager

Re: Newspaper workers strike

Message: I have received notice from the paper that the newspaper workers and publishers have not been able to come to an agreement on a new contract, and that the strike may continue for some time. Please compile a list of possible alternatives to this temporary problem, and your recommendation for action.

6

MEMO

To: Advertising Layout

From: Advertising Copywriter

Re: Last night's ads

Message: I noticed last night that our full page ad on the back page of the first section was faded and crooked. How did your copies look: what do you think we should do about it?

7

MEMO

To: Advertising Manager

From: Men's Wear

Re: Promotion of knit sport shirts

Message: The sport shirts we have advertised on KNOB and in the paper just have not been selling. Perhaps different copy or a new layout would do the trick. What do you think?

Forward Layout

See what kinds of ideas you can come up with before 2:00. Meet me in the office to discuss them. Adv. Mgr.

8

MEMO

To: Advertising Layout

From: Advertising Manager

Re: Employee knowledge of ads

Message: Check with the newspaper office to see if they can furnish enough copies of our ads to be posted in their respective departments. Also, check with each department to determine if they have a place they can post ads for the employees' reference.

YOU WORK IN EXTERIOR DISPLAY

You are our exterior display person. It is one o'clock on Monday afternoon, and you have just returned from lunch to find some messages awaiting you.

1

TO: Exterior Display

DATE: Monday TIME: Noon

WHILE YOU WERE OUT

M Display Manager

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent X	Will call again

Message: By 3:00 today I need a list of all the display equipment that needs to be replaced from window display. Please try to get it as soon as possible.

2

TO: Exterior Display

DATE: Monday TIME: Afternoon

WHILE YOU WERE OUT

M Display Manager

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: Sportswear has complained because their window hasn't been changed; customers have even made comments on it. Why wasn't it changed? You'd better get to it soon!

3

TO: Exterior Display

DATE: Monday TIME: Noon

WHILE YOU WERE OUT

M Karen

of Advertising Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: KNOB T.V. is going to do some shooting for the warehouse sale spots tomorrow at 9:30. You may want to touch up some of the displays for this.

4

TO: Exterior Display

DATE: Monday TIME: Afternoon

WHILE YOU WERE OUT

M Your mother

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: She asked that you pick up two skeins of scarlet yarn (the washable kind) before you come home.

5

MEMO

To: Exterior Display

From: Interior Display

Re: Colored lamps

Message: Where are you keeping the colored lamps now? I need a few of the blue ones for this afternoon.

6

MEMO

To: Display Manager

From: Store Manager

Re: Window display pulling power

Message: Would you please do a traffic count on the two store entrances and the effect of the displays on drawing customers into the store. I would like the study done for a week during the dinner hour (5:30-7:00).

ward Exterior Display

This is your project. If you have any questions, feel free to ask for help

7

M E M O

To: Exterior Display

From: Ladies' Lingerie

Re: Display of a new shipment

Message: I know that you're terribly busy, but could you find the time to change the lingerie section of the women's wear window? This shipment just came in and is pretty late for the season. Having some good display would really help to sell it. Thanks a lot!

8

M E M O

To: Exterior Display

From: Payroll clerk

Re: Your paycheck from two weeks ago

Message: We have not received back the cancelled check for your salary the week of the 9th. Have you cashed it yet?

YOU ARE WORKING IN INTERIOR DISPLAY

You are our interior display person. This is Tuesday afternoon, you have just returned to work after taking the morning off to go to a funeral. There are several messages left for you. You had better take a look at them before going to change that display you had planned on doing.

1

TO: Interior Display

DATE: Tuesday TIME: Morning

WHILE YOU WERE OUT

M Display Manager

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: I need a list of the materials and equipment that is worn out or needs replacing so that it can be ordered. Can you have it in my office by 3:00?

2

TO: Interior Display

DATE: Tuesday TIME: Noon

WHILE YOU WERE OUT

M Advertising Manager

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent X	Will call again

Message: KNOB is going to be carrying some special TV spots for the Warehouse Sale. We will need some displays set up in the warehouse for them to film. They will be here tomorrow morning at 9:30.

3

TO: Interior Display

DATE: Tuesday TIME: Afternoon

WHILE YOU WERE OUT

M iss Peabody

of AAUW Phone 729-5555

Telephoned X	Came to see you
Please call X	Wants to see you
Urgent	Will call again

Message: The AAUW benefit style show is coming up next month, and they wanted to know if you have any props that they can borrow for the stage.

4

TO: Interior Display

DATE: Tuesday TIME: Noon

WHILE YOU WERE OUT

M Automotive Shop

of _____ Phone _____

Telephoned X	Came to see you
Please call	Wants to see you
Urgent	Will call again

Message: The Store Manager has changed his mind about the prices for the unadvertised special -- we will need new showcards lettered immediately.

5

M E M O

To: Interior Display

From: Display Manager

Re: Children's Wear display

Message: They have just informed me that the display there was knocked over by a customer's child and that the mannequin is broken. It needs immediate attention as they are very busy with the sale.

6

M E M O

To: Interior Display

From: Display Manager

Re: Time management

Message: I would like to speak to you in my office sometime today about time management and store policies.